

Global Wine Trends

Weekly Update

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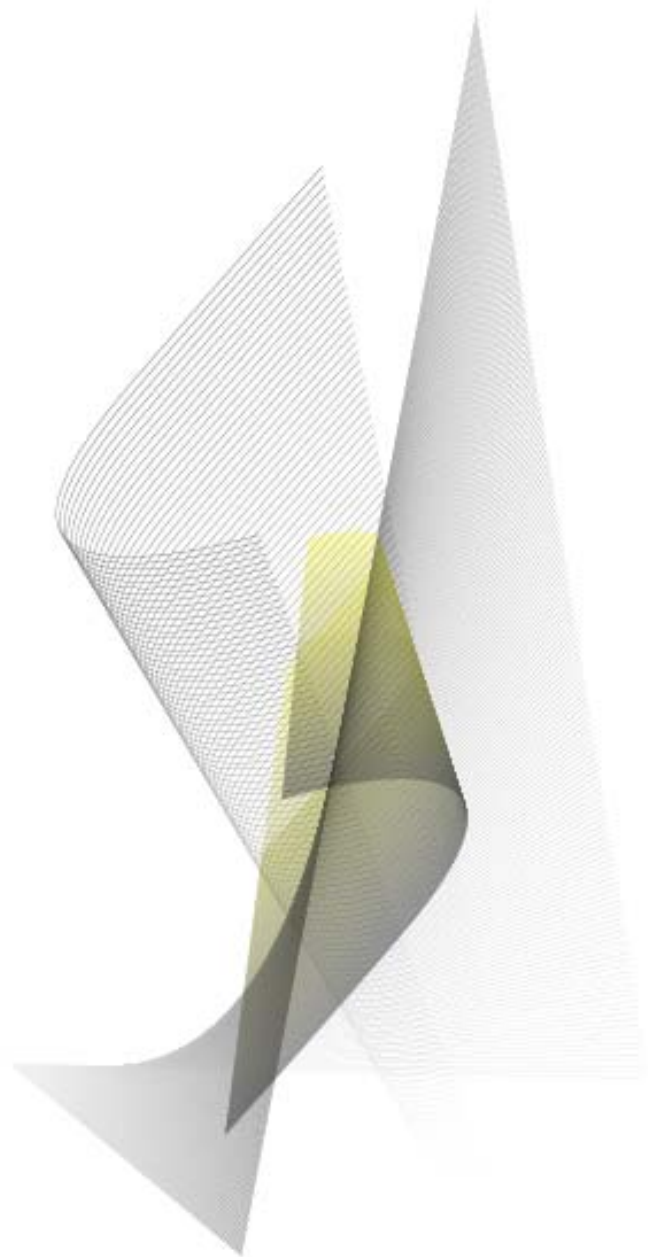


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Global Market Watch

The global market watch outlines developments, spotted and emerging trends that define the current situation in the global wine landscape. It includes all major developments in the market including consumer trends relating to wine and marketing campaigns or approaches, as well as concerns on health and sustainability.

Amazon shelves wine plans

DECANTER,UK

27.10.09: **Online retailer Amazon.com has abandoned plans to sell wine in the US after the project hit a series of problems. The company confirmed the news some 18 months after reports of its scheme for direct wine sales first surfaced.** 'I can confirm Amazon will not be getting into the wine business,' a spokesperson told decanter.com. Amazon declined to reveal further details after an email from a senior executive to a number of wineries was leaked to the US media.

'I am very sorry to let you know we have recently decided not to resume shipping,' Amazon senior account manager Dini Rao said in the email. 'As you know, we were excited to work with you to build the AmazonWine business. For that reason, this was a very tough choice for us.' **Amazon's plans to sell wine direct have been beset from the beginning by problems caused by the complicated regulatory and distribution system in the US. The retailer had hoped to ship US wines to up to 26 states, but its fulfilment and logistics partner, New Vine Logistics, ceased trading in June this year, before being taken over by Inertia Beverage Group.** One industry source said the retailer had been unable to make the business model work for wine. 'There were just too many issues with fulfilment and distribution to make it worth their while,' the source said. 'If anyone could have made it work, they would have – but shipping wine in the US is a logistical and regulatory nightmare.'

<http://www.decanter.com/news/news.php?id=290978>

Oddbins not out of the red yet

OFF LICENCE NEWS, UK

23.10.09: **Oddbins has revised its pledge to break even by the end of year, setting its sights on 2010. Managing director Simon Baile told OLN the chain was forecast to be £1.5 million down by December 2009, missing his initial target because of the recession.** Commenting on figures due to be filed at Companies House today, Baile said Oddbins lost £6.25 million on a turnover of £76 million for the year to December 2008, compared to a deficit of £8.7 million the previous year. However, Baile said the business was losing £6.4 million when he took it on from Castel last August. He added: **"The difference between where we will be at the end of 2009 and where we want it to be in 2010 is not huge. We don't have to do a big job. We've got the products now and I think the staff believe we've got the products and the will to do it. It's all possible."**The release of the accounts comes a fortnight after a public "kicking match" with Castel which called in receivers to recover funds it claimed it was still owed. **Under the terms of the sale, Oddbins**



was required to pay funds into a joint account but there was a dispute over the amount outstanding. As a result, Oddbins withheld sums from the account. Both parties confirmed the disagreement had been resolved, though Baile admitted Oddbins were “very upset” that this action has been taken. Some suppliers said it had made them uneasy about dealing with the retailer. One said: “We have an outstanding bill with Oddbins. We’re looking to revise payment terms.” In response, Baile said: “We are pretty good payers. We’re on the nail with the big suppliers and take our responsibility very seriously. Our creditor days are well below the UK industry standard.” On his relationship with Castel, he added: “We respect them. Despite all the mistakes Castel made, they did not run away from Oddbins, and they could have done a long time ago. “They could have said, ‘This is too hard, let’s tip it over’ and they didn’t. “Lots of people could have been out of a job, it could just be a website by now. People wanted to take it off their hands and cut it up. But the said ‘No we don’t want that to happen. We want to give it to someone who will take care of it’, which is quite generous. “Whether you like them, whether you agree or disagree with them, I hold them in high regard for that, because it would have been easy to turn the taps off.”

<http://www.offlicencenews.co.uk/articles/74686/Oddbins-not-out-of-the-red-yet.aspx?categoryid=9059>

Sainsbury's wine discovery

OFF LICENCE NEWS, UK

27.10.09: **Sainsbury's is piloting a new wine bay with a “discovery” theme in 220 stores. The trial will go live today, and is motivated by a need to “educate and inspire” shoppers, according to senior wine buyer Julian Dyer.** “Even in today’s straitened times, there is a role for innovative, exciting, quality wines that offer a genuine point of difference to our customers,” he said. “Our buyers have had carte blanche to make some real discoveries.” Wines featured in the new section will include Chilean Maycas del Limari Reserva Sauvignon Blanc 2007 (rrp £8.99), Fina Vini Grillo 2008 from Sicily (rrp £8.99) and a 100% Syrah Cave Saint-Désirat Saint-Joseph 2007 (rrp £9.99). Wine buyer Michelle Smith said the new wine bay would be positioned next to the fine wine section in stores, and be accompanied by shelf-edge barkers featuring tasting notes and photos of food-matching suggestions. **“The wines are a good expression of their type. We’re looking for things we don’t currently have in the range,” she added. The supermarket has also undertaken a major revamp of its Burgundy range after switching suppliers to the Blason co-op. Newcomers include Blasons de Bourgogne Mâcon-Villages 2008 (rrp £5.49), Taste the Difference Petit Chablis 2008 (rrp £7.51) and Taste the Difference Chablis Premier Cru 2007 (rrp £12.99).** Dyer said: “While everyone has been talking about the demise of French wine, we have found that the classic regions can be a force for growth, and Burgundy should be no exception.”

<http://www.offlicencenews.co.uk/articles/75384/Sainsburys-wine-discovery.aspx?categoryid=257>

Le Beast teams up with Virgin

OFF LICENCE NEWS, UK



27.10.09: **Le Beast Vineyards and Virgin Wines have teamed up to launch a nationwide campaign urging consumers to help "Save France Cos the French Can't". The social media drive is designed to halt the current drop in French wine production and encourage clearer labeling for bottles being sold in the UK, according to Clink! Wines managing director Catherine Monahan.** "It's based upon the premise that the French have utterly failed at reversing their slide in the wine business, and need help from passionate consumers to save their industry," she said. **A Le Beast blog, pages on Twitter and Facebook, slots on regional radio and a direct mail viral video will all be used to communicate the campaign's message, and Virgin will be supporting the push with a direct mail campaign to all its consumers.** Le Beast's Twitter feed and videos from the campaign will also stream directly on to Virgin's home page. The campaign coincides with Virgin taking on Le Beast's Merlot/Cabernet Sauvignon 2008, which will sport an exclusive label (rrp £7.99). Chief wine buyer Andrew Baker said: "Virgin sees this as a huge opportunity to engage with consumers in a new and entertaining way, and being an innovative online brand ourselves, we decided to take Le Beast on as one of our first brands ever. "We're very excited to see the results of this campaign and the potential introduction of new consumers to our business."

<http://www.offlicencenews.co.uk/articles/75386/Le-Beast-teams-up-with-Virgin.aspx?categoryid=9059>

Wash. wine facilities getting larger as growers plant more acres, production increases

LA TIMES, USA



26.10.09: Six years ago, Precept Brands chose not to compete with companies making big-bucks wines, instead seeing opportunity in the under-\$10-a-bottle market. Seems like it was a good move — the company recently expanded to a 53,000-square-foot facility with storage tanks rivaling those found at diesel plants in size. **Up the road in Richland, Goose Ridge Vineyards just completed construction of a massive production facility of its own. The new building will enable the winery, a smaller company, to bottle 325,000 cases this year and even more in the future. Save for a few big operators, Washington state has largely been home to small, boutique wineries, despite its No. 2 ranking for premium wine.** But the massive

storage and fermentation tanks being erected up and down the state's wine corridors prove that things are changing. "There's a lot of consolidation overall in the wine industry. Because of that, a lot of the bigger wineries, not necessarily us, have a lot more market opportunity," said John Freeman, winemaker for Waterbrook Winery, the flagship label for Precept Brands. "There's room to grow." When it comes to wine production, Washington still can't touch California, which produces some 90 percent of U.S. wine. **California is home to 2,843 wineries and more than 500,000 acres of wine grapes, and its overall value to the state is nearly \$59 billion, according to the California Wine Institute. Washington sits a distant second with 33,000 acres, 600-plus wineries and a value of \$3 billion.** Washington still trails California, and small wineries that produce 5,000 cases or less still dominate the state's



industry, said Robin Pollard, executive director of the Washington Wine Commission, a promotional agency financed by fees on member wineries and growers. But facilities like this make it easier to try and catch up, she said. **"The construction is a sign our industry is growing and, in spite of the economy, we are seeing increasing investment,"** Pollard said. **Long known for its cattle operations in central Washington's lower Yakima Valley, the Monson family first planted wine grapes in the late 1990s. Now the family's Goose Ridge Vineyards comprises 1,400 contiguous acres, with more to come.** The new production facility includes 30 tanks, each equivalent to about 7,500 cases of wine, with a total storage capacity of 18,500 gallons. Yet most of that wine is made for someone else. The winery currently bottles only about 7,500 cases under its Goose Ridge label and another 50,000 cases under its Stone Cap label. The rest is sold for bulk wine for retailers and other wineries to sell as their own. "We can grow it, make it and bottle it for you under your own label. It's a diversified business," Monson said. "We're hoping to grow that industry, because that's a niche we can provide for small and large wineries." Precept Brands, on the other hand, focused on consolidating and increasing production of its dozen-or-so brands, with a sideline of some custom bottling for retailers to help build sales relationships. The new facility has 89 tanks with a total capacity of 900,000 gallons. "With our production, we make a lot of wine for ourselves," Freeman said. **"The custom bottling, it's a foot in the door to sell our own wines." Increasing production is an important part of Washington's wine industry making a bigger mark on the national and international wine scene, Pollard said. "It will translate to having more wine to fill orders, which means we'll be able to garner more shelf space in retail shops or on wine lists in restaurants," she said. "We're not there yet, but we will be viewed as a serious player in the world market."**

<http://www.latimes.com/business/nationworld/wire/sns-ap-us-farm-scene-big-wineries,0,817873.story>

Stone's Ginger Wine launches a great British promotion

TALKING RETAIL, UK

28.10.09: **Constellation Europe has announced that it will be targeting half a million consumers in the run-up to Christmas, with an attention-grabbing national promotion from Stone's Original Green Ginger Wine - The Great British Original. Stone's dominates the branded ginger wine category with almost 50% market share.** The promotional activity celebrates the unique 'Britishness' of the much-loved brand and launches in October to support the key Christmas sales period. **It offers adult consumers the chance to win the 'Dream British Getaway worth £5,000' and runs nationally across multiple grocers, specialist and convenience outlets.** Consumers will have the unique opportunity to choose for themselves how to spend £5,000 on their ultimate British getaway. The possibilities are endless - from sky diving in the Outer Hebrides to luxury yacht cruising around the Dorset coast. **The promotion also offers 200 runner-up prizes of Stone's picnic blankets, perfect for those cold winter nights and later to take to the beach in summer. Adults will be able to enter the competition via www.stonesgingerwine.com/britishgetaway or through an application form on the collar.** The eye-catching promotional neck collar also includes four versatile seasonal drink ideas giving consumers another reason to buy Stone's. **It will also drive consumer awareness that Stone's is available all year round and reinforces its position as a true British original and the UK's number one ginger wine.** Clare Griffiths, VP of European Consumer Marketing for Constellation Europe, comments: "Stone's has a strong



association with the festive period. Last year, sales in the 13 weeks leading up to Christmas were up 129% compared with the rest of the year. "There was also a staggering 257% uplift in the four weeks leading up to Christmas so retailers should stock up on Stone's to maximise this profit opportunity."

<http://www.talkingretail.com/products/drinks-news/13540-stones-ginger-wine-launches-a-great-british-promotion.html>

Spar gives wine speak some local flavour

TALKING RETAIL, UK

28.10.09: **With 64% of shoppers admitting they are intimidated by wine labels and confused by the language on the back of bottles, leading convenience retailer SPAR has come up with the ingenious idea of tailoring their wine labels to local dialects. The retailer, which has 2,600 stores across the UK, is currently looking into testing new labels on a selection of its wines to find a more palatable way of talking wine with its 12 million weekly customers.** SPAR has "translated" a number of its wines, adding local dialects including Scouse, Geordie and Scottish to its tasting notes. Here's a taste of a fine Merlot from SPAR on its new Geordie speak label:

Original translation:

"A truly great Merlot which is ablaze with succulent blackcurrants and blueberries. This Cabernet has legs like a thoroughbred, strong and forward, which tantalises your palate. Its full bouquet is a delight for your nose and will leave you yearning for more. This isn't a wine for the faint hearted."

Geordie translation:

"A canny Merlot ableeze wi succulent blackcurrants an blueberries. This Merlot has legs leik a thoroughbred, strong an forward, tha sucks the leif oot of yer palate. Its stowed bouquet is a delight fer yer nose an will leave yee clamming fer moor. This ain ne blash" SPAR's Wine Controller Laura Jewell believes the wine industry should be working harder to make the complexities of its products more accessible. She said: "The descriptions of wines on labels are too often confusing and complicated and rarely use the language of everyday conversation. We want to cut through that, using the real words that our customers use when they talk about a great glass of wine. "The response we have had already has been fantastic and people say it's great to see wine not taking itself too seriously - we take our quality and value very seriously, but also believe wine drinking should represent a more fun experience." "Ultimately our wines will speak for themselves, but in the meantime it's time to speak people's language," said Laura Jewell.

<http://www.talkingretail.com/products/drinks-news/13541-spar-gives-wine-speak-some-local-flavour.html>

Yealands Estate Wins Gold At New Zealand International Wine Challenge

TIZWINE.COM, AUSTRALIA

28.10.09: **Yealands Estate's recently released 2009 Yealands Estate Sauvignon Blanc has already been given the thumbs up by wine critics with a gold medal at the New**



Zealand International Wine Challenge, held in September. It was one of just 17 Sauvignon Blanc's to be awarded a Gold medal. With tough competition from more than 2,000 entries, the medal signals a promising year ahead for Yealands' second vintage. "We're thrilled the quality of our second vintage has been recognised through this award," says Tamra Washington, Yealands Estate winemaker. "We are still discovering the potential of the young vineyard, so it's fantastic to see the style and quality of our wines evolving from 2008 to 2009." The award follows a recent run of gold medals for Yealands Estate – one of the world's leading sustainable wineries. **At the New World Wine Awards in August, the Yealands Sauvignon Blanc 2008 picked up a Gold medal, one of only 36 wines awarded Gold. The New World Wine Awards is strongly consumer-focused, with affordability and availability of the wines being the key criteria for entry. Also in August, the Yealands Estate Gewurztraminer 2008 picked up a Gold medal at the Romeo Bragato Wine Awards.** The annual awards give recognition to viticultural excellence and recognize the influence of grape growers and their vineyards in creating the unique qualities of New Zealand wine. More recently the Yealands Pinot Gris 2008 was awarded gold at the Liquorland Top 100 in September. **The highly competitive international wine tasting determines the 100 best wines available in the New Zealand market, and attracted more than 1,460 entries.** Founder Peter Yealands commented, "Four gold medals in three months is fantastic recognition for Yealands Estate and proof that sound environmental practices can produce top quality, affordable wines." In only 14 months of operation, Yealands Estate has now amassed more than 100 awards.

http://www.tizwine.com/index.php/ps_pagename/newsdetail?pi_newsitemid=1871

6,500 jobs under threat as wine giant fights for its life

THE DAILY MAIL, UK

28.10.09: **More than 6,000 jobs were under threat last night as the troubled owner of Threshers and Wine Rack battled to save the firm from administration. First Quench, which owns the High Street off licence chains, was locked in talks with business services firm KPMG which is advising the company on its options, including trying to find a buyer.** The firm, which employs 6,500 staff, most of them parttime, confirmed it was considering a number of options. Troubled times: Frist Quench, the owner of Threshers, is expected to make an announcement regarding its future within days 'It is no secret that the credit crunch has made a very competitive marketplace even more challenging,' a spokeswoman said. 'The board, in consultation with its advisers, has been actively considering a number of restructuring and strategic options and any decision will be made in the best interests of the business and its stakeholders.' An announcement is expected within days. First Quench, which also owns convenience store chain The Local and the off licence chain Haddows in Scotland, has been struggling due to competition from supermarkets and the impact of the financial crisis. Earlier this year, it warned that some of its 1,300 stores would close if it was unable to renegotiate rents with landlords.

<http://www.dailymail.co.uk/money/article-1223668/6-500-jobs-threat-wine-giant-fights-life.html>



South Africa's liquid gold rush

BBC, UK

23.10.09: **For the 5,000-strong crowd converging on September's Soweto Wine Fair, this year's event was a roaring success. The so-called "black diamonds", the country's prosperous new middle class, jostled shoulders in the festival's giant marquee as they tested the latest star attractions - new blends of Chenin Blanc, Sauvignon Blanc and Syrah.**

The wines on offer are a source of great national pride.

One woman told Africa Business Report: "I've just tasted the most amazing wine and it's South African. Our country is really getting it." Her friend added: "Look how big this hall is and it's filled with South African Wines. It's amazing".

'Untapped market'

In Western markets, the wine industry is in difficulty.

As a discretionary purchase, a decent bottle of plonk is one of the first things that consumers cut back on when budgets are tight. But South African vintners have increasingly focused on new markets, and the plan has paid off. By the end of August, sales of Chenin Blanc and Chardonnay to China had risen nearly three times on the same period last year, and the growing domestic market is strong. Festival organiser Mnikelo Mangicipo told the BBC: "[The winemakers] had to go and tap into the untapped market, which is the black market. "And fortunately we have the numbers. The more people you are exposing to these wines, the more the sales and the turnover of the winemakers [increase]." South Africa's trade with the rest of the world is powering ahead, almost oblivious to the events in the rest of the world economy. Exports increased to \$4.4bn (£2.7bn) in the first seven months of the year, according to government figures, a rise of almost a half on the same period in 2008.

'More education'

Wine is seen as a key part of that success. The hope now is that 2010 will prove another record breaker. **Ntsiki Biyela, a science graduate of Stellenbosch University and resident vintner at the Stellekaya boutique, has just won the title of South Africa's "Woman wine maker of the year".** For her, it's a double honour in an industry dominated both by men and, until the end of apartheid, white farmers. She has no doubt where the future lies. **"The wine industry is still running short of black people... still running short of black-owned wineries and black-owned brands. We have them but it's just a few. "We need more education for people who want to invest... because the wine industry is not like any other".**

<http://news.bbc.co.uk/2/hi/business/8323300.stm>

Spanish winemaker Torres warms to environmentalism

THE GUARDIAN, UK

29.10.09: **Southern Britain may not be the only place in the world where risk-loving vintners can take a chance on global warming. Climate change is already changing habits at vineyards in southern Europe, forcing some producers, such as Spain's**



Torres, to buy land in the Pyrenees – "just in case", says the company's chairman, Miguel Torres. Production of pinot noir and chardonnay at 1,200 metres above sea level has already started, showing no less quality than the wine produced on the gentle hills of the Penedès region, just south of Barcelona. Fears are growing, however, that lowland areas could be reduced to dust in a couple of generations. **"Temperatures have already risen by one degree," Torres says. "If they increase by five, southern Europe will be full of arid steppes." This one-degree rise has already brought forward the harvest by 12 or 13 days, he says.** "Vineyards are very sensitive." Torres has donated €10m (£9m) of his own money to environmental issues, and is aiming to reduce the output of CO₂ in the winery by 30% by 2020. He has a hybrid car and has bought them for his staff, invested in a wind park and is experimenting with the capture and use of CO₂ from wine fermentation.

The businessman has not used synthetic chemicals in his vineyards for more than 20 years, instead using insect traps baited with sex pheromones secreted by females to trap the males and thereby stop reproduction. Next week, the 67-year-old will wine and dine, in his home, 200 environmental experts, who are meeting in Barcelona before the Copenhagen climate conference in December. "We want to show them that they're not alone," he says, "that here, in the [wine] industry, we are also very worried about this." "It would be dramatic to have a very hot year, such as 2003, coinciding with a drought," he muses. "Luckily, we had a lot of rain in the spring of 2003." The fourth generation of a family that has produced wine in Catalonia since 1870, the veteran vintner has increased exports, which now account for two-thirds of the company's almost €200m annual sales. **Britain is Torres's top export market, with 4.2m bottles sold a year, including brands such as Sangre de Toro and Viña Sol.**

Motivated

Moderation is the idea that Torres wants to engrave in his family business, shying away from a glamorous lifestyle. The biggest present to his children was to pay for half of the homes they bought when they married. He has never given them cars and he pays them as much as other employees of the same level at the company, which now employs some 1,200 people. **Torres feels he is fair to his staff, as after reading Marx and Bakunin in his youth, he "can understand how workers feel, and the need to have a motivated workforce," he says.** The funds he allocates to his employees' pensions surpass the 5% of profits that are distributed to shareholders – all family members, he says. Above all, he wants to make sure that the company stays loyal to what he calls its principles of honesty, profitability and quality. A stockmarket flotation is far from his thoughts: "That would be a deadly sin – that would send us to hell; that's when you become short-termist."

Disputes

Family ownership guarantees a patient and long-term outlook, much needed in the wine industry, Torres says, adding that his firm re-invests 95% of its profits in the business. Torres says he learned to be patient when his father refused to pass control of the company to him, believing that he would "die while working" some day. After taking a year off in Montpellier at the age of 40 to distance himself from family disputes, Torres says: "As my father saw me more relaxed, he started to yield control." During his tenure, Torres has been more focused on production than his father, who was a "great salesman", he says. He has improved technology and will start producing organic wine for the Spanish market this year. A traditionalist, he is also keen to revive ancient varieties of Catalan grapes, which are in danger of disappearing. The region once had more than 100 varieties of vines but after the phylloxera epidemic of the mid-19th century, only a dozen have survived. **In the past 15 years, he has rediscovered 58**



types by contacting farmers and asking them to alert him when they find a vine they do not recognise. Apart from tending his 2,000 hectares of vineyards in Chile, California and Catalonia, Torres also plans to expand his olive oil business as demand for healthy Mediterranean products grows around the world. Good habits and moderation are the key, he says, as he heads off for a short siesta.

<http://www.guardian.co.uk/business/2009/oct/29/spanish-winemaker-torres-environmental-change>

New Age is the 'Cool' Top-Selling White Wine in 'Hot' Argentine Category

REUTERS, UK

29.10.09: **The continued growth of Argentine wine imports to the US (more than 40% annually over three years) has made it the most important "import to watch" in the wine industry. That New Age White is the largest-selling Argentine white wine in just-released Nielsen Research data on Argentine wines sales in the US makes it a "hot brand" in a hot category.** This does not surprise Argentines, who say that Americans have finally discovered what bar patrons and club-goers in Buenos Aires and the rest of the country have long-known - New Age is the most unique, flavorful, and versatile Argentine white wine on the market. **New Age White ranks twelfth among all Argentine wines in total dollar sales from September 2008 to September 2009 - the eleven wines ahead of it are reds and it leads other well-known Argentine producers such as Los Alamos and Marcus James. This refreshing wine has shown an 89.1% increase in sales over the past year.** The success of New Age in the US is not through advertising but via a persistent and creative grass-roots marketing campaign that focuses on a heavy schedule of tasting opportunities and the creation of drink recipes that helped the brand straddle the line between traditional wines and cocktails. According to Stephen D. Kreps, president and co-owner of Quintessential, the fine wine company that is importing New Age, the wine's popularity in the US didn't happen overnight. "Back in 2003, my son and I were in Argentina visiting the Valentin Bianchi winery, where New Age is made. We noticed everyone enjoying this 'fizzy' white wine on-the-rocks, with a twist of lime. We were just starting to introduce New Age to the US and cocktails were experiencing a resurgence, especially with younger drinkers. While New Age is refreshing and delicious served chilled by itself, we thought we might have a viable 'point of difference' in showing how versatile it is. In addition to adding lime, it's great mixed with almost any fruit juice." Quintessential's co-owner and national sales manager, Dennis Kreps, picks up the story. "Once our sales force understood that New Age's unique versatility distinguished it from other white wines, they started creating their own cocktails with New Age as the base - sharing those cocktails with the rest of the company, as well as buyers, bartenders and waitstaff. It works as an aperitif or dessert wine...and is excellent with spicy food." **Quintessential has made New Age White a 'focus' wine for almost every on- and off-premise tasting their salespeople conduct.** "It doesn't matter if it's an in-store tasting or expensive wine gala," Dennis explains, "the New Age table is always among the most crowded and always the wine our pourers run out of first." In 2004, Quintessential brought New Age Rose to the US. A blend of Malbec and Merlot, with the same "fizz" as its white sibling and refreshing flavors of fresh red berries, it has steadily climbed up the sales charts and is especially enjoyable as the main ingredient of the South American Sangria. Both New Age White and Rose are exclusively imported by Quintessential, www.quintessentialwines.com.



<http://www.reuters.com/article/pressRelease/idUS165216+28-Oct-2009+PRN20091028>

Acid Test: Jacob's Creek Three Vines (50cl)

THE GROCER, UK

24.10.09: **The consumer**



The smaller bottle is perfect for midweek drinking. It eliminates the temptation to drink half a regular 75cl bottle (which often results in 'challenges' the next morning). The abv and mellow flavour are also sensible and do not shout 'headache' like some of the heavy reds. At £4.99 a bottle it is a tad expensive, considering the range available in 75cl bottles. I might buy it for a midweek dinner party, though, as it lends itself to food and wine matching. Four stars (out of five)

Anna King, student, London

The retailer

The demand for smaller size formats is definitely growing, and 50cl gives consumers an opportunity to trade up in quality without spending more than they intended.

Opting for a tall, slim bottle rather than a mini version of a 75cl bottle is a good move. The wine itself is juicy and ripe, without being overpowering or jammy, and still bears the stamp of the sunny Australian climate. Overall good value for money, but Pernod Ricard will need to invest heavily in raising consumer awareness for this format to catch on. Four stars

Dror Nativ, wine trading manager, Spar

The Grocer

Reducing the size of the bottle and the price is a great idea. It reduces wastage, as you don't end up with that abandoned half-glass-worth lingering at the bottom of the bottle, and you can glug half a bottle on a school night without feeling guilty. The wine itself was mellow and smooth and made a fine accompaniment to red meat. Having a price point below £5 is important and I am not surprised the 50cl craze is catching on among other wine suppliers. Four stars

Anna-Marie Julyan, food and drink reporter

<http://www.thegrocer.co.uk/articles.aspx?page=articles&ID=204514>



Global Industry Watch

This section records developments and trends on both industry and individual corporation levels that form a matrix of the major issues and moves in the industry as a whole or by its critical actors and groupings, such as trade associations and regulatory bodies.

Cider and wine bodies pool resources

HARPERS, UK

27.10.09: **The two main trade organisations for the UK wine and cider industries are forging closer links. From 2010 the Wine & Spirit Trade Association will provide management services to the National Association of Cider Makers. The NACM will share the back-office facilities of the WSTA and administrative support to NACM officials for communication with members and arrangement of events.** Jeremy Beadles, chief executive of the WSTA, said: "It makes sound economic sense for trade associations to cut costs and streamline operations where possible and the nature of our communication with the Government and within the industry means that there is scope to share some resources. "We are delighted the NACM wish to work with us and I am confident our members will benefit from closer collaboration." Henry Chevallier Guild, chairman of the NACM, said: "The NACM has always enjoyed a great working relationship with the WSTA and to now benefit from some of the resources they have available is a real benefit for our organisation and our members. "Like never before it is important to ensure that we operate as efficiently as possible and also as effectively as possible in our engagement with government and others as we seek to tackle the issues we face."

<http://www.harpers.co.uk/news/news-headlines/8466-cider-and-wine-bodies-pool-resources.html>

Bumper harvest turns sour for Bulgaria's grape growers

THE INDEPENDENT, UK



26.10.09: **This year's grape harvest in Bulgaria proved to be a bumper one but independent grape growers around the country say they will be in no mood to celebrate. Plenty of sun and just the right amount of rain have boosted the yield to well over 400,000 tonnes of grapes from 369,400 tonnes last year. And winemakers say the quality is excellent, too, with**

high sugar content, mouth-watering aroma and rich colour. Nevertheless, independent grape growers will not be cheering, because slumping wine sales are forcing major winemakers to cut back the volumes of grapes they traditionally purchase from them. And travelling in one of Bulgaria's wine-growing regions between the southern city of Plovdiv and nearby Assenovgrad, home to Mavrud, one of the most popular red grape varieties, one comes across scores of crates filled with grapes lining the roads, with makeshift "for sale" signs. "Do you want to buy some?" asks 65-year-old Elena Nikolova from the nearby village of Proslav, rather hopefully. "It's a nightmare," she huffs.



"The wineries don't want to take it at all or try to buy it dirt cheap, so we're forced to try and sell the grapes by the roadside. But can you imagine how many people will really buy it to take home and make their own wine?"Nikolova said she and her three cousins, who work 1.2 hectares of Mavrud, have decided to uproot their ageing vineyard and sell the land next year.

Hundreds of thousands other small vineyard owners, who were given their land back after the communist-era cooperatives were dismantled, are facing similar fates... .. Already this year, the wineries will cut nearly half of their purchasing volumes to around 120,000 tonnes this year from 203,447 tonnes last year, according to data compiled by the National Vine and Wine Chamber. Two thirds of Bulgarian wines are made for export, most of it going to Russia, which accounted for 62 percent of total exports of 87 million litres last year. But orders to Russia have slumped by around 25 percent. Sales to other countries, such as Poland, Sweden, Britain, Germany and the Czech Republic, have also dropped, leaving winemakers with enough stock of unsold wine to cover sales for another year even if no wine is made at all this year, the data showed.

<http://www.independent.co.uk/life-style/food-and-drink/bumper-harvest-turns-sour-for-bulgarias-grape-growers-1809331.html>

New Zealand-Hong Kong Wine Arrangement Signed

SCOOP WORLD, NEW ZEALAND

28.10.09: **"The Arrangement specifically acknowledges New Zealand Winegrowers' world-leading sustainability framework, which provides a significant point of difference for New Zealand in the Hong Kong market.** "New Zealand looks forward to a continued partnership with Hong Kong as it develops as a regional wine wholesaling, marketing and distribution centre in Asia,"Mr Groser said. In early 2008, Hong Kong abolished its excise tax on wine as part of its strategy to become a regional wine hub. New Zealand's wine exports to Hong Kong in the year to June 2009 were up by 44 per cent to NZ\$ 8.9 million.

<http://www.scoop.co.nz/stories/WO0910/S00380.htm>

ARGENTINA IMPORTS CHILEAN WINE TO FIX WINE SHORTFALL

THE SANTIAGO TIMES, CHILE

28.10.09: **Still hurting from a yearlong drought, Argentina is turning to Chile for wine imports in order to keep up with popular demand for wine. Wine production in Mendoza – the heart of Argentina's Andean wine region - is down 30 percent – or 3 million liters. The average production level in normal years is 15 million liters.** This is the first time since 1993 that Argentina, the fifth largest producer of wine in the world, has relied on imports from neighboring Chile to compensate for shortages. **"Importing wine from Chile reduces total cost by 15 to 20 percent," said Guillerma Garcia, president of the National Institute of Vitivinicultura (INV). Chilean wine imports amount to just 2 percent of total wine production in Argentina, he added.** "We're talking about an area of 900,000 hectares in Argentina that has lost 60 percent of its red wine production," said Javier Merino, director of Argentinean wine consultants. "This is inevitably going to result in a 60 to 70 percent rise in prices." But with major wineries stocking their shelves with Chilean wines, prices



should remain stable. **Three of Mendoza's largest wineries - Ferrovica, Penaflor and RPB Baggio - purchased 160,000 liters of red wine from Chile, said Merino. Ferrovica plans to order another 300 liters this week, the Argentine press reports. The value of Chile's wine exports has jumped sharply the past 20 years, from about \$2 million to \$1.5 billion last year.** The United Kingdom, for example, now imports more wine from Chile than from its closer neighbor South Africa. Although Chile is best known worldwide for copper production, wine, fruit and forestry products account for about a quarter of all exports.

<http://www.santiagotimes.cl/santiagotimes/index.php/2009102817482/news/agricultural-wine-news/argentina-imports-chilean-wine-to-fix-wine-shortfall.html>

New national park threatens growth of vineyards

HARPERS, UK

28.10.09: **The future growth of Sussex vineyards may be under threat due to a national park that will be created in early 2010. The future growth of Sussex vineyards may be under threat due to a national park that will be created in early 2010.** Mike Roberts, owner of Ridgeview Estate, told Harpers how it will become difficult for him and other wineries within the South Downs national park boundaries to expand because of restrictive planning legislation. "The idea of making wines that belong in a national park is interesting," said Roberts. "But on the other side of the coin any future planning will be subject to the national park planning body and it is unlikely that will allow for expansion. "It means that not only will we not be able to grow in size but we will have to apply for planning permission to set up tasting facilities or extensions to the winery." Roberts who produces sparkling wines made by traditional varieties and methods sees this as a concern because the much of the English wine industry is currently in growth. "Our first harvest was in 1997 and we have grown every year since then. We thought 2008 was our record vintage, but 2009 will double that." He says that there is capacity for around 1-million bottles of wine to be produced within the park, but adds there is no mention of the agri-industry in the plans. "I hope they will take into consideration the economic wellbeing of those that live and work within its boundaries," says Roberts. The South Downs national park will come into being next April, it will stretch between Eastbourne and Winchester and contain a total population of 108,000.

<http://www.harpers.co.uk/news/news-headlines/8468-new-national-park-threatens-growth-of-vineyards.html>

Still scope for wine growth despite recession, says Distell's Gallow

SOUTH AFRICA WINE NEWS, ZAMBIA

29.10.09: **Announcing that the company's flagship brand Nederburg has just been listed by the major Dutch supermarket chain Albert Heijn BV, he said the new deal was consistent with Wines of South Africa's (WOSA) aim of building wines sales in Holland's premium segment.**

Seven Nederburg wines, he said, would be selling for between 4,99 and 5,99 Euros in Albert Heijn stores. The multiple grocer is the leading retailer in the Netherlands. "WOSA recently unveiled a marketing strategy designed to counter South Africa's over-representation in Holland's extreme value market, where wines are priced below 2 Euros, and instead grow sales



in the mid-priced band, by focusing inter alia, on brand champions."

Gallow was confident that Nederburg would find favour with the Dutch supermarket's customers, given the brand's long-standing heritage, its well-established prize-winning tradition and its heightened international profile emerging from the association with the 2010 FIFA World Cup.

Nederburg has been granted the official license to produce a special collection of wines in the lead up to next year's tournament and that will be sold until the end of 2010. "Already on offer in a range of markets, these wines are being actively merchandised across the international duty-free channel, strengthening the brand's visibility," he said. He believed Distell's strategic partnership with agent, Baarsma Wine Group Holding (BWGH), newly strengthened with the inclusion of additional wine brands from his company, would further consolidate its position in Holland. BWGH is a leading player in the Dutch retail and on-consumption channels representing a range of established trademarks to over 6,000 trade customers. The organisation also sells direct to a consumer base of over 30,000. Gallow confirmed that Distell had secured listings with the majority of the major multiple grocer chains in the UK, where Nederburg was performing well, along with Two Oceans, which had been steadily building support worldwide, given its reputation for excellence at very accessible prices. Already very popular in Canada, its biggest market globally, **Two Oceans is now escalating its profile in the US, thanks to positive reviews from Robert Parker's Wine Advocate and other influential critics, and sells between US\$8 and US\$10, a price segment in which sales remain buoyant. Distell also sells many of its wine brands across the African continent and in certain Asian markets, as well as Australia and New Zealand.** The company reported a 22% year-on-year increase in total wine export volumes for the 12 months to June and should maintain a double-digit growth momentum during the present financial year, in Gallow's view. "In the present climate, shoppers are obviously very price-focused. Distell has followed a policy of austerity in good times and in bad, and manages a very cost-effective supply chain to over-deliver on the price/quality ratio, while protecting brand equity. This is an approach that should continue serve us well, particularly while consumers are forced to be so budget-conscious."

<http://www.wine.co.za/News/news.aspx?NEWSID=14820&Source=News>

Foster's hives off 13 wines to Vok Beverages

THE AUSTRALIAN BUSINESS, AUSTRALIA

25.10.09: **BEVERAGE giant Foster's has hived off 13 underperforming wine brands into a joint venture with privately held Vok Beverages as the final step in an overhaul of its wine division. Vok, which distributes brands including Bulleit bourbon and Gilbey's gin in Australia, will from December assume responsibility for the marketing, sales and management of the brands, while Foster's will continue to handle production.** The brands to be transferred to the joint venture are Queen Adelaide, Half Mile Creek, Minchinbury, Matthew Lang, Andrew Garrett, Maglieri of McLaren Vale, Rouge Homme, Great Western, Cartwheel, Fishers Circle, Galway Pipe, Boronia and Yarra Ridge. The brands were among 37 labels in the Foster's portfolio identified as contributing just \$60 million in sales between them during a review of the wine division following a \$730m writedown of assets last year. Of the 37 targeted brands, 17 including Kaiser Stuhl have been scrapped entirely, one has been sold and another six are up for sale.



Foster's chief executive Ian Johnston told shareholders at the company's annual general meeting in Brisbane on Wednesday that deletion of underperforming brands would contribute to cost savings of \$100m in 2010-11. David Dearie, managing director of Foster's Australian and New Zealand wine division, said the Vok joint venture "substantially completes the rationalisation of the Australian wine tail brands announced as part of the wine strategic review outcomes in February". "This joint venture allows Foster's to focus on wine making, distribution and marketing of its core portfolio," he said. It was hoped the move would also enable Vok to capture new opportunities for the wine brands as part of a smaller, more focused portfolio.

Foster's has sought to focus its wine business on high-margin premium wines, abandoning cask products and low-end plonks that produce little in the way of profit. The company will hold a 50per cent interest in the joint venture but has not revealed the value of the deal other than to say it is not expected to materially affect its finances. Meanwhile, Foster's is continuing to pursue the sale of 33 winery assets identified as surplus to requirements during the asset review. The company has so far agreed to the sale of 12 vineyards comprising about a quarter of the 7200ha up for disposal. The biggest sale to date has been the 862ha Cumbandry vineyard near the central NSW town of Mudgee to wine industry veteran Bob Oatley.

<http://www.theaustralian.news.com.au/business/story/0,28124,26251508-36418,00.html>

Asia drives increase in wine exports

NEWS.COM, AUSTRALIA

26.10.09: **WINE exports increased in volume but declined in value in the latest financial year. The Australian Wine and Brandy Corporation's annual report says wine exports increased six per cent to 750 million litres in 2008/09. However, in value terms they declined 10 per cent to \$2.43 billion with an average price decline of 15 per cent to \$3.24 per litre.** The Federal Government agency said the sector faced challenging trading conditions in 2008-09, with the global financial crisis, exchange rate volatility, continued intense competition from other nations, and supply and demand "imbalances". Despite the trading environment, the volume of wine exported was still the second highest on record, behind 2006/07, when wines were exported at \$5 a litre. **The top five growth markets for wine exports were China, Hong Kong, Malaysia, Japan and Finland. China was the standout destination, with the value of exports to that market increasing by \$32 million to \$94 million, making it Australia's fourth largest market by value.** Adelaide Now, 9 Jul 2009 Meanwhile, there appears to be good news for the wine industry when it comes to domestic consumption. Since 1996-97, per capita consumption of beer has been decreasing from 121.4 litres, to 106.6 litres in 2007-08. **The per capita consumption of wine has slowly increased from 24.1 litres in 1996-97 to 28.3 litres in 2007-08. The consumption of alcoholic spirits, per capita, has also increased to 2.2 litres of alcohol in 2007-08, compared with 1.7 litres of alcohol a decade ago.**

<http://www.news.com.au/business/story/0,27753,26259826-31037,00.html>

Italian wine harvest shows good quality but drop in quantity

AGENCE FRANCE PRESSE, FRANCE



25.10.09: **Italy's 2009 wine vintage will be generally very good, but output will be lower than expected because of unusually hot weather followed by torrential rain, the national association of growers said Saturday. Total production is estimated at 44.5 million hectolitres, four percent lower than forecast, compared with 46.3 million in 2008.** "The 2009 production is of generally excellent quality especially in the centre and north, but clearly below the average quantity of the preceding five and 10 years, local media quoted association head Giuseppe Martelli as saying. **The fall was particularly acute in the south, including Puglia, Abruzzo and Sicily, but partially compensated by rises in such areas as Piedmont, Emilia Romagna and around Venice.** Martelli also said **that the market was weak and Italian bulk wine prices were down 13.3 percent in the first half of this year compared with the same period of 2008.** The global financial situation favoured quality wines but at restricted prices, Martelli said, adding that Italian wine had held its own but at a cost of reduced margins for producers.

<http://www.google.com/hostednews/afp/article/ALeqM5jSw-Q0fUuiSsCHP2jbsfoK8NaQE0>

Does South Africa possess a regional identity?

SOUTH AFRICA WINE NEWS, ZAMBIA

29.10.09: **European tourists to our local wineries often express their surprise at the variety of cultivars produced at a single winery. It seems to them that an entire range and mix of wine regions are on offer at one producer alone. This raises the question, does South Africa possess a defined regional viticultural identity or is our identity limited to that of the winery?** On the one side we have the European Old World regional model based on specific grape varieties and types of wines. On the other we have the New World regional model of varietal experimentation and diversity which South Africa follows. **But whilst our wine regions might lack the strict varietal restrictions and identity as found in say France's appellation system we have developed a regional awareness. This is partly because as wine authority Michael Fridjhon points out "South African wine regions are defined and protected."** It also because through our defined regional system broken further into districts and wards there appears to be the **desire to refine the South African terrior.** But our varietal versatility, that we are equally adept at making red and white wines whilst being a viticultural strength can equally serve to complicate our regional identity. **A quick whiz through some areas will show where we are at present and where we are heading. Constantia** is a case in point in terms of varietal versatility. Known for its elegant and long lived Sauvignon blanc and to a lesser degree Semillon, it also produces some fine more reserved cooler climate reds. **Klein Constantia** being a good example. Following the Sauvignon blanc trail **Durbanville cements** its reputation as Sauvignon blanc country with an often grassy character but Sauvignon leader Nitida showing more explosive, tropical flavours demonstrating the variation than can occur within a specific area. **Cool Elgin** produces austere, minerally Sauvignon blanc with long term ageing potential (see Iona and Oak Valley Wines) together with other aromatic whites and some fine cool climate Pinot and other reds. **Elim** also produces some fine Sauvignon with an often dusty character; one can sense the chill of the ocean in their wines. Continuing the cool region theme **Walker Bay** is well known for its high quality Pinot and Chardonnay, Hamilton Russell playing a pioneering role in the Hemel-en-Aarde Valley. **Stellenbosch** continues its reputation as the premium wine district in South Africa. Its wines can possess both power and elegance. To my mind its two top varieties being Cabernet Sauvignon and Chardonnay. The wines of **Paarl** tend



to have a baked character (the sun showing its influence?) but producers such as Veenwouden demonstrate that elegance is still possible. **Franschhoek Valley** produces wines generally lighter in character but frequently with some elegance. **Warm Robertson** is known for its whites but its reds are starting to reveal greater promise. Whilst all this is well known to many what it demonstrates is that in terms of determining regional identity "climate is the dominant factor" as Fridjhon observes. **While the drive to find cooler growing sights shows one regional tendency an equally exciting drive (in my view) is the exploration of warmer sights for Rhone and Mediterranean varieties. We seem to moving in both directions.** With all the varietal experimentation going on South Africa's regional identity remains a work in progress but this identity is being rapidly defined as we continue to understand our terroir. **The problem is that despite this as Fridjhon points out "The bulk of our exports travel under the widest possible generic names - Western Cape or South Africa: there's no chance of any except the most sophisticated consumers beginning to grasp the regional specificity."** This means that whilst our regional identity might be clear to many local consumers, we still need to work harder in creating a regional awareness abroad.

<http://www.wine.co.za/News/News.aspx?NEWSID=14824>

Wine Domain Catalysts Watch

This section records the most important articles written by those widely considered to be thought experts in the wine domain. These opinions are not only a valuable source of information but also provide important indications for current and evolving trends in the wine domain.

Languedoc 2009 - small but perfectly formed

JANCIS ROBINSON, UK

27.10.09: Languedoc News, published by the trade organisation the Conseil Interprofessionnel des Vins du Languedoc, **reports a small crop but what looks to be a great vintage - what they actually say is 'grand et gourmand' but gourmand is so hard to translate in this context: 'appetising', 'lip-smacking'?** Here's the gist of their report, with the French original below. With no great climatic calamities during the year, a very hot August contributed to the ripening and concentration of the berries and a healthy crop, but it will be smaller than in 2008 - estimated at less than 12 m hectolitres, down 8% on last year, which was not big. Whites are particularly affected, with volumes down 20-30%. (Estimates for France as a whole suggest the harvest will be bigger in 2009 than in 2008, up from 44 m hectolitres to 47 m.) Cool nights in June and July promoted balance in the fruit and a hot August accelerated the ripening and concentration stages and brought the harvest forward by at least a week. Signs are good for the grapes already gathered in: whites are fully ripe and concentrated, the quality of the red varieties, which seem to have withstood the heat of August well, is high.

<http://www.jancisrobinson.com/articles/a200910231.html>



Is it wrong to drink rosé wine in winter?

THE GUARDIAN, UK

26.10.09: **Why does rosé wine provoke such social anxiety?** This week, as the morning air began to nip for the first time this season, I was approached by a friend. "Is it," she wanted to know, "wrong to feel that it's wrong to drink rosé in winter?" Crikey. **The question appealed to all my most embarrassing foibles. While I always say that the right drink is the one you most feel like at the moment of thirst, it's true that weather as well as mood dictates what I put in my glass. But rosé wine tastes good all year round. I'm not the only one who thinks so – sales continue to surge (11% of all wine bought in supermarkets and off- licences, at the latest count). We are not just buying it during the warmer months. But have you paused to consider what shade of rosé you choose as the temperature falls? In summer, I long for the pale, barely there salmon hues of Provençal rosés.** On a dark and frosty night I am more likely to opt for a chilly glass of translucent, raspberry-hued liquid from the Languedoc or Argentina, not only because it looks beautiful, but its more emphatic flavour somehow feels life-affirming too. In fact, the colder it gets, the darker and more jewel-like the rosé I choose. I confessed this to a technician at the Centre de Recherche et d'Experimentation sur le Vin Rosé in the south of France (yes, such a place does exist), expecting to be scoffed at. But in fact climate seems to affect people's choice of rosé so much that French winemakers "deliberately make different colours to send not just to different countries but to different parts of France. We've noticed that in the north, where it's colder, they seem to prefer a deeper shade of pink." So this winter, just as I did last, I will be holding my head up high and ordering plenty of rosé.

<http://www.guardian.co.uk/lifeandstyle/2009/oct/26/rose-wine-in-winter>

Wine: Class in a glass

THE GUARDIAN, UK

24.10.09: Oh no! The inevitable has happened. I have turned into a wine eccentric. Well, not really so much a wine eccentric as a wine glass eccentric. I recently turned up to someone's house carrying my own set, which is at least three steps worse than being the sort of person who goes on holiday abroad accompanied by an emergency can of hot dog sausages. Please bear with me here.

Wine glasses change your perception of the drink in a discernible manner. It is possible to flatter a particular style of wine by pouring it into a glass shaped to suit it – or, rather, to suit what you want out of it. Examples: in a glass with a wide, shallow bowl, the smell of wood on an oaked chardonnay will be more apparent than it would be in a taller one. And the large bowl of a pinot noir glass is sculpted to enhance the fragrance; the same wine in an ordinary glass is diminished in comparison (I once demonstrated this to my mother, who refused to believe it was the same wine).

But what I've been getting het up about is my fallback glassware – the set I use to taste everything. This used to be Riedel's Vinum Chianti glass; then I came across Dartington Crystal's Chef's Tasters, from which I refused to be parted until several of them cracked in the sink. Time to find something new, but what? Anyone who acknowledges there might be a



scientific difference between one basic glass and the next, but doesn't believe it's noticeable to an ordinary mortal, has never been tormented by a pillow that's not quite right. As a poor sleeper can detail the fine differences between virtually identical pillows, so it is with me and glasses. I tried Spiegelau and Schott Zwiesel tasting glasses, went back to the Riedel, experimented with a host of John Lewis and Habitat cheapies, hoping for a hallelujah moment. Nothing quite fit. Schott Zwiesel's Viña goblets came close – elegant to look at and better with some bottles – but I missed something; the larger bowls gave the wine a more diffuse feel. I like the way Dartington's Chef's Tasters seem to frame the wine. So, like a runaway dog returning home, head low, I have gone back to them.

<http://www.guardian.co.uk/lifeandstyle/2009/oct/24/wine-glasses-victoria-moore-review>

Scientific Developments & Technological Breakthroughs Watch

This section captures the developments in the scientific research landscape in terms of technological breakthroughs and emerging research covering both R&D from companies but also research from academia and institutional bodies. These are essential elements of future trends or cumulatively combined indicators of future market trends and consumer awareness as well as industry practice development.

Cider-makers aim to develop sector

MORNING ADVERTISER, UK

29.10.09: **Recent innovations include mulled cider, dessert cider, cider-based cocktails and a sparkling perry made using the Champagne method. Producer Once Upon a Tree, holder of this year's International Cider & Perry competition Champions Cup, has added two cider-based extensions to its portfolio. Blenheim Orange 2008 is a single variety dessert cider that has been designed to perfectly accompany a dessert or cheeseboard, and Ribston Lawn sparkling perry, which has been designed to offer a substitute to sparkling wine.** "I believe our dessert cider is unique in the UK, no-one else has attempted to use techniques borrowed from ice-wine production to make a sweet wine-like cider on a commercial basis," said director Simon Day. "The apple juice is concentrated using a freeze-thaw method and the result is a very intense flavour similar to that of a dessert wine." Day used his skills as a professional winemaker and viticulturalist to create the two drinks. "My ambition is to bring techniques from the wine world to Herefordshire," he said. "Ribston Lawn sparkling perry is a fine, elegant drink with a fizz that you would expect from top quality Champagne." Other producers are also looking at ways to diversify the cider category. The Turberfield Royale cocktail is a new English perry-based cocktail created at the Talbot Inn in Ledbury. The drink, based on the Kir Royale, was the winning drink from six cocktails all created using combinations of sparkling wine, apple ciders, perries, blackcurrant cordial and strawberry bitters. "The perry pears combine with our Pixley blackcurrant to create a luscious drink with suggestions of rose petals," said Pixley Berries cordials' Edward Thompson.

<http://www.morningadvertiser.co.uk/news.ma/article/84898>



Link Between Alcohol And Cancer Explained: Alcohol Activates Cellular Changes That Make Tumor Cells Spread

SCIENCE DAILY, UK



27.10.09: Alcohol consumption has long been linked to cancer and its spread, but the underlying mechanism has never been clear. Now, researchers at Rush University Medical Center have identified a cellular pathway that may explain the link. **In a study published in a recent issue of Alcoholism: Clinical and Experimental Research, the researchers found that alcohol stimulates what is called the epithelial-to-**

mesenchymal transition, in which run-of-the-mill cancer cells morph into a more aggressive form and begin to spread throughout the body. "Our data are the first to show that alcohol turns on certain signals inside a cell that are involved in this critical transition," said Christopher Forsyth, PhD, assistant professor of medicine and biochemistry at Rush University Medical Center and lead author of the study. **The epithelial-to-mesenchymal transition is a hot area of research right now, implicated in the process whereby cancer cells become metastatic. A large body of laboratory and clinical research suggests that it plays a key role in making cancer cells aggressive.** "Cancer cells become dangerous when they metastasize," Forsyth said. "Surgery can remove a tumor, but aggressive tumor cells invade tissues throughout the body and take over. If we can thwart this transition, we can limit cancer's toll." The researchers treated colon and breast cancer cell lines with alcohol and then looked for the biochemical hallmarks of the epithelial-to-mesenchymal transition, including evidence of a transcription factor called Snail and of the receptor for epidermal growth factor. Snail controls the epithelial-to-mesenchymal transition; when overexpressed in mice, it induces the formation of multiple tumors. Epidermal growth factor is required by many cancer cells. "They need lots of it," Forsyth said. "They are addicted to it." **Laboratory tests showed that alcohol activated both these and other biochemicals characteristic of the epithelial-to-mesenchymal transition. Tests also demonstrated that the alcohol-treated cells had lost their tight junctions with adjacent cells, a preparation for migrating, as metastatic cells do. In addition, Forsyth and his colleagues found that the same roster of biomarkers was activated in normal intestinal cells treated with alcohol, suggesting that alcohol not only worsens the profile of existing cancer cells but also may initiate cancer by stimulating the epithelial-to-mesenchymal transition.**

<http://www.sciencedaily.com/releases/2009/10/091026172052.htm>

How Consumers Choose Wines

WINES & VINES, USA

28.10.09: **An inconsistent product is one of the biggest obstacles to building the reputation of an appellation or wine brand, Washington state researchers have found.** "If your AVA is inconsistently producing quality, then that can hurt the price of your wine," said Dr. Jill McCluskey, a professor in the School of Economic Sciences at Washington State University and co-author with Drs. Marco Costanigro and Christopher Goemans, both



assistant professors at Colorado State University, of "The Economics of Nested Names: Name Specificity, Reputation and Price Premia," published earlier this week by the American Association of Wine Economists. **The paper examines pricing trends in the California wine industry, looking specifically at the connection between AVA (American Viticultural Area) designations and firm reputations on wine pricing. Consumers seeking a value wine typically will base the choice on the winery's region. A wine that proclaims its origins in a region known for producing good-quality wine -- especially an older, well-established AVA -- will fare better in the marketplace than a bottle from a lesser-known AVA. McCluskey explained that consumers are willing to go with a general reputation when deciding among bottles from various lesser-known producers. But the more expensive the potential purchase, the more research consumers are willing to do about the actual producer.** "It's not that costly to be wrong when you're buying an inexpensive bottle, but when you're buying a more expensive bottle, it is more costly to be wrong," she said. Appellation is foundational to the success of more expensive wines, McCluskey said, but it plays a smaller role as a component of the overall price, because consumers examine the reputation of the producer more closely the more they're planning to pay. "Most consumers may find it optimal to use aggregated names for inexpensive products, but at high prices, they may be willing pay to search more and form quality expectations on more specific names," the paper states. While consumers factor in the reputation associated with more specific information as the value of a wine increases, the role of sub-appellations is often overshadowed by the reputation of the older, more-encompassing appellation. "Certain AVAs in California are very large, overlapping or entirely including smaller ones," stated a note to the paper. "Generally, wine labels report only the smallest AVA name.... In the few cases in which two AVA names were found, the name of the oldest AVA was used." **Based on this information, the paper determined that older appellations are more valuable in forming the reputation of a wine.** The paper even pins a value to an appellation's age: "According to our estimates, the AVA premium of the median wine increases each year by an average of \$0.29, implying that older AVAs fetch higher prices at parity of (present and past) quality." However, McCluskey said a history of inconsistent quality will undermine the contributions both an appellation and firm contribute to value. She pointed out that the reputation of some older firms contribute to a negative price premium equivalent to about 3 cents per year in the overall value of a producer name. "Consistency matters," she said. **"Wine is one of the unique industries where you want one of your close-by competitors to produce a high-quality product."** Another eminent wine economist earlier had expressed some doubt about the value of increasing, and increasingly small, AVAs. Dr. Mike Veseth, Robert G. Albertson professor of international political economy at the University of Puget Sound, asked, "How many AVAs are enough?" Commenting in April on approval of a new appellation for Washington's Lake Chelan, Veseth told Wines & Vines that the new Lake Chelan AVA is a good idea in principle, but whether it highlights the unique character of local wines in a way that consumers understand is key. His concern is that too many AVAs have the potential to create confusion rather than clarity. Veseth believes the bigger factor in an AVA's success lies in its ability to develop a unique reputation for itself. A designation that helps a region do this will have enduring value. The new Lake Chelan AVA is a good idea in principle, he said, but whether it highlights the unique character of local wines in a way that consumers understand is key. His concern is that too many AVAs have the potential to create confusion rather than clarity. **Veseth believes the bigger factor in an AVA's success lies in its ability to develop a unique reputation for itself. A designation that helps a region do this will have enduring value.** The study of the value AVA and firm reputation contribute to pricing is part of a broader interest McCluskey has about the impact of product attributes on price. She



previously authored a paper regarding the role played by sensory variables in consumer willingness to pay for Washington state wine. A future study will correlate spatial relationships between wineries to wine value.

<http://www.winesandvines.com/template.cfm?section=news&content=68700>

Red wine makes fish taste too fishy

THE DAILY TELEGRAPH, UK

22.10.09: **Researchers have found that iron in the red wines reacts with substances in seafood to produce a nasty flavour in the mouth. The findings back up the connoisseurs' established the rule of thumb that has in the past seen the drinking of red wine with fish as a social faux pas. Vitamin C super-pepper developed by Marks & Spencer Professor Takayuki Tamura, of the University of California, and colleagues said their discovery allows drinkers to predict accurately which wines might trigger a fishy aftertaste.** They found that wines with high amounts of iron had a more intensely fishy aftertaste. But this fishy taste diminished when the researchers added a substance that disguised the iron. The findings, published in the Journal of Agricultural and Food Chemistry, does suggest that low-iron red wines might be a good match with seafood.

The scientists asked wine tasters to sample 38 red wines and 26 white wines from all over the world while dining on scallops. **Some of the wines contained small amounts of iron, which varied by country of origin, variety, and vintage.** Professor Tamura said: "The typical combinations of red wine with meat or dry white wine with fish are partially explained by interactions between wine components and food ingredients. **"Food proteins reduce the bitterness and astringency of tannic red wine and the sourness and astringency of dry white wine on the basis of the senses of taste and touch.**" In addition, red wine paired with seafood is not recommended in some literature because red wine clashes with fish, creating a ferrous taste, fishy and metallic odours, and bitterness in the mouth. **"On the other hand, sherry is recommended in the literature as a potent acceptable partner of kippers and mackerels besides white dry wine. However, these recommendations are not based on scientific understandings of wine and food combinations, but personal or empirical opinions.** The iron content of a wine depends on the composition of the soil in which the grapes were grown, the dust on the berry, contamination during harvesting, transportation, and crushing, and the conditions during fermentation. Another factor contributing to the clash between red wines and fish is that the strong flavour of tannins produced from the grape skins overpowers the delicate flavour of seafood.

<http://www.telegraph.co.uk/science/science-news/6408825/Red-wine-makes-fish-taste-too-fishy.html>



Wines from Greece Publicity Monitor

This section presents all international publicity relating to wines from Greece.

Greeks uncorked French passion for wine

PHYSORG.COM



23.10.09: Rewind 2,500 years, however and the original makers of Côtes-du-Rhône are more likely to have prided themselves on rather different qualities, such as Athenian sophistication, and perhaps just a soupçon of Spartan grit. **Writing in a new study, Cambridge University Professor Paul Cartledge suggests that the French, not to mention the rest of the West, might never have become the passionate wine lovers we are without the assistance of a band of pioneering Greek explorers who settled in southern France around 600 BC.**

Finding a sheltered port at the mouth of a major river system with natural hilly defences, the Greeks founded the city of Massalia, or modern-day Marseilles, and soon began to mingle and trade with friendly local tribes of Ligurian Celts, turning the settlement into a bustling entrepôt. Within a matter of generations, Professor Cartledge says, the nearby Rhône became a major thoroughfare for vessels loaded with terracotta amphorae containing a new, exotic Greek drink made from fermented grape juice that would soon be taking the uncivilised tribes of western Europe by storm. Travelling up the river might even have constituted the original booze cruise.

The portrait of Marseilles' origins, which appears in a new book, *Ancient Greece: A History In Eleven Cities*, will, Professor Cartledge hopes, lay to rest an enduring debate about the historic origins of supermarket plonk. Although some academics agree that the Greeks were central to the foundation of Europe's wine trade, others argue that the Etruscans (of modern Tuscany), or even the later Romans, were the ones responsible for bringing viticulture to France.

As Professor Cartledge points out, however, two points swing the argument firmly in the Greeks' favour. First, the Greeks had to marry and mix with the local Ligurians to ensure that Massalia survived, suggesting that they also swapped goods and ideas. Second, they left behind copious amounts of archaeological evidence of their wine trade (unlike the Etruscans and long before the Romans), much of which has been found on Celtic sites. The story is just one of a number covered in the book with which Professor Cartledge hopes to make a much more serious and wider-ranging point about where the boundaries of Ancient Greece really began and ended.

Rather than covering the geographical area occupied by the modern Greek state, he argues that we should understand Ancient Greece as having covered a far greater area, from Georgia in the east to Spain in the west. "In a way, the title of the book is misleading, because there was no Ancient Greek state as we understand the term now," Professor Cartledge said.

"Instead, there were many, many Greek cities - perhaps a thousand of them at any one time. It is in these cities that we find a civilisation that is one of the major taproots of our Western



culture and civilisation today." Modern scholars accept that Ancient Greece was a conglomeration of cities such as Athens, Sparta and Thebes, but further-flung offshoots like Marseilles, Nice, Syracuse and Byzantium have typically been regarded as colonial outposts.

In fact, Professor Cartledge says, they were an extension of the Greek model, which had no sense of a wider state beyond that of the self-governing city and its hinterland, rather like Italian city states centuries later...

<http://www.physorg.com/news175507773.html>

Also published:

Ancient Greeks, not Romans gave France the gift of wine - BRITAIN NEWS, UK

<http://www.britainnews.net/story/557332>

Russian wine gets real

FINANCIAL TIMES, UK

24.10.09: I feel rather ashamed of my recent trip to inspect vineyards in Russia. Firstly, and most unusually, I went at the invitation of some wineries there. I usually insist on paying my own way but my weekly employers at the Financial Times had no qualms about my being a guest in this, virtually uncharted, corner of the wine world where local knowledge is particularly useful.

The local government has long been particularly wine-friendly and now there are state subsidies to instil order and trellising into old, unkempt vineyards and to plant new ones. It is official state policy apparently to restore the total area of Russian vineyard to its pre-Gorbachev 1984 level of more than 400,000 ha, although the national total is still only 65,000 ha despite some determined planting recently. (See Russian vineyard & cellar.)

Fanagoria, for example, which claims to be Russia's biggest producer of estate-bottled wines, has about 2,300 ha of vineyard, of which almost two-thirds are very new, very neat, mechanisable plantings in the fertile black soils of the Taman peninsula. The winery takes its name from the ancient Greek colony one can so easily imagine on this spit of land between the Black and Asov seas with its views of the Crimea just three miles across the water. Every summer the mounds over the ancient settlement are uncovered and more gems from successive incomers are unearthed. The local archaeological museum is stuffed with Ottoman, Genoan, Slavonic, Khazar, Byzantine, early Christian, Roman and ancient Greek leftovers from the spoils sent to the Hermitage in St Petersburg.

The museum's curator claims that viticulture pre-dated the Ancient Greeks in this part of the world. What is certain is that it died out soon after the Greeks left and was not revived until the 19th century, firstly in the Crimea and then on Russia's Black Sea coast. Abrau Durso is Russia's oldest winery in continuous operation, catering to Russians' longstanding love of sparkling wine. Sweet red wine is another wine style traditionally prized by Russian consumers, who were long taught to disdain native products in favour of bottles labelled Georgia (although one major problem with the Russian wine market continues to be the lack of regulation).

The Kremlin's sudden ban on wine imported from Moldova and Georgia in 2006 has provided a market opportunity for Russian wine, although it has to labour against the prevailing view that



foreign means fancy. Fanagoria admit that they put the word 'export' in English on their wine labels because it adds value in Russian eyes. Even official figures acknowledge that 70% of the wine labelled as Russian is made up of bulk imports of cheap wine from the likes of Spain, Ukraine and Argentina. Wine made from grapes grown in Russia accounts for just 20% of all wine sold in Russia. Nevertheless, sales of truly Russian wine are growing and have encouraged a recent influx of investors, and consultants such as London-based John Worontschak, who works at all three of my host wineries, in Kuban. ...

But non-Russians might be more titillated by less familiar varietals such as the crisp white Rkatsiteli and fiery red Saperavi that the Russians have borrowed from Georgia, and curiosities such as Tsimlansky Black, from the banks of the Don, that seems to be able to make smoky, dusty reds with real character. But without wine laws, the Russian wine scene is likely to continue to be as undisciplined as my preconceptions.

Subscription Based

Blogosphere Monitor

In this section the most important blog entries for wine and Greek wine are recorded.

Amazon stops selling wine before it ever starts; Wine blogs on Forbes.com

DR VINO, USA

25.10.09: Back in March 2008, when word leaked out about Amazon's possibly selling wine, Mike Steinberger asked, **hopefully, whether Amazon.com could end the war over direct wine deliveries. He continued: "the entry of the Internet retailing colossus into the business seemed just the thing to finally break the logjam over interstate wine shipping."** Instead, the logjam crushed Amazon (AMZN). Late Friday, winebusiness.com ran a story that Amazon was putting its wine retailing business on hold, citing correspondence between amazon and wineries. I contacted members of the AmazonWine team for comment and they were either away on vacation reply or said that they could not comment. The Wall Street Journal got through to a spokesman who confirmed the wine trial was over. **The intractable logjam was the interstate shipping laws that govern interstate wine shipping. You can get 200 pages or so on it in my book Wine Politics: How Governments, Environmentalists, Mobsters, and Critics Influence the Wines We Drink. Or you can check out Tom Wark's post for a more concise background on the logjam known as the three-tier system.** Further, California law on unlicensed "third parties" may have affected the group's plans. I look forward to the final analysis of how exactly Amazon attempted to achieve a different structuring of interstate wine retail and why, sadly, it flopped. While AmazonWine kept program was kept under wraps, conventional wisdom is already blaming the bankruptcy of New Vine Logistics, which put the domestic wine component in jeopardy (imported wines were also to be available).

Given the economics of shipping wine, the company may have been targeting higher-priced bottles. In that regard, the economic backdrop didn't help the plan as high-end wine sales have softened in the past year even though overall consumption of (lower-priced) wine is slightly higher. In other news, Forbes.com ran a piece late Friday piece entitled, "Must-read wine blogs." It's a must-read itself



and will give you some tips on some more blogs to add to your feed reader, if those good ones mentioned are not in yours already.

<http://www.drvinoc.com/>

Also published:

Amazon and the Three Tier System of Wine Distribution - FERMENTATION, USA

<http://www.fermentation.typepad.com/>

Mixed Blacks

WINE CAMP, USA



23.10.09: **Mixed blacks**, an old term that used to be the backbone of wines like Gallo's Hearty Burgundy. It was a catch all phrase for varieties that did not command a premium like those that could be bottled under their own name. It also referred to a very old way of planting as farmers would plant many different varieties in their vineyards so they wouldn't have all their grapes in one basket - if one variety had a bad year perhaps the others would do better. The 'mixed blacks' were the bottom of the totem pole and got bottom dollar for the farmer.

Today that's turned on its head as these old mixed planting vineyards have become a national treasure of old vines and interesting varieties. Girard Winery has taken full advantage of one of these vineyards producing their 2006 Girard Mixed Blacks from a century old vineyard with a mixed planting of syrah, zinfandel, petite sirah, grenache, mourvedre, carignane and a few other varieties whose identity remain a mystery. All the varieties are co-fermented (always an interesting idea) and aged in a blend of French (85%) and American oak for eighteen months. What a wine this is! Loaded with explosive black fruit and layered with earthy touches of porcini and smoked meats, it fills the mouth without being heavy. Girard has avoided the ponderous, one dimensional character of so many "old vine" wines from these varieties. A crisp acid bite keeps this wine alive and it will remind Rhone lovers of a good Cornas or Crozes Hermitage, of course with an added dose of ripe California fruit. Too few of these great old vineyards survived the rush to plant more fashionable varieties. It's great to see a winery give such an old treasure its due.

<http://www.winecampblog.com/>

China's changing palette

REUTERS, UK

24.10.09: Pampered grapes and expensive price tags in China's growing wine market. The specially imported grapes at Bodega-Langes winery in Heibei province enjoy a constant concert of classical music from the vineyard right through to the cellars. Just in case they suffer culture shock. **China's increasingly affluent society is testing its palette on grape wines, both premium and budget, and the potential market of 1.3 billion customers has enticed both foreign and local investors.**



<http://blogs.reuters.com/china/2009/10/25/chinas-changing-palette/>

Peripheral Domains Intelligence

This section covers developments from associated domains such as Greek food, taste and culinary trends, as well as any other significant information that has an impact on or derives from the global wine domain.

Sampler-style tasting bar opens in Bordeaux

DECANTER, UK

23.10.09: **A Sampler-style tasting bar has opened in Bordeaux, offering tasting samples of all the first growths, and the Right Bank's top wines including Cheval Blanc and Ausone. The Wine Gallery has been financed by Bordeaux negociants Bordeaux Winebank and Max Bordeaux. Director Stanislas Garaud told decanter.com, 'it's not a wine bar, nor a wine shop, but somewhere in between.'**

<http://www.decanter.com/news/>

Students learn art of fine winemaking at FLCC

DEMOCRAT AND CHRONICLE

25.10.09: Introduction to Wines and Vines isn't your typical college course. Offered this school year as part of a new Finger Lakes Community College program, the course helps prepare students for careers in the 273 wineries and 32,000 acres of vineyards across the state. **Over 15 weeks, the students don't just read about grapes. They visit vineyards and wineries and get primers from experts on the art of winemaking, which for this class uses some high-tech procedures now available to achieve what winemakers accomplished in China 9,000 years ago. "If you read about many civilizations, wine was actually a big part of these societies,"** says one instructor, Justin Scheiner. While the class tries to familiarize the students with the history of wine and grape-growing, it has a much more practical purpose of training them for a career in an industry that, according to the New York Wine & Grape Foundation, pumps more than \$3.4 billion into the state's economy. Although Cornell offers a four-year program in viticulture and oenology, no school in the region offers a two-year program that FLCC now provides. A recent session of the FLCC class started in the Food Research Lab of the New York State Agricultural Experiment Station in Geneva. Six lugs — large plastic trays — were packed with grapes. Scheiner explained the fate that awaited the 50 pounds of Frontenac grapes from the Hudson Valley that were being dumped into a stainless steel stemmer.

. The students enrolled are as young as 17-year-old MacKenzie Green, who is a senior at Marcus Whitman High School getting ready for a career in the wine industry, to 59-year-old Carl Hampton, a retired food plant supervisor who hopes to someday own his own vineyard.

"This will head me in the right direction," says Hampton. Scheiner has teamed up with FLCC assistant professor Jana Lamboy to teach the class. Lamboy says that she was asked by FLCC President Barbara Risser to organize a program in grapes and winemaking. "It is a way to



connect with the community," Lamboy says.

<http://www.democratandchronicle.com/apps/pbcs.dll/article?AID=/20091025/NEWS05/910250307&template=printart>

Baby sheep keep vineyards in perfect condition

SHANGAI DAILY, CHINA

28.10.09: **SOME vineyards in New Zealand and California are milking sheep for all they're worth. "Well, they are mini-sheep really. Their proper name is Babydoll sheep," said New Zealand vintner Peter Yealands. "They're a very rare breed, but an old one."** Yealands had to jump through a number of bureaucratic hoops just to get 10 of the Babydolls from Australia to his vineyards in New Zealand's Marlborough region. Wool is his country's leading export, so why import more sheep?

Yealands was looking for an environmentally friendly way of keeping his 1,000 hectares of vines properly maintained during the growing season. "It's common practice to have normal size sheep - Merino is what we use - to come to the vineyards during the winter when the vines are dormant," he said. The results are a well-fed flock for the shepherd and a clean vineyard for the vintner. But once the weather warms and the vines begin to bud, the Merinos are banished. "Let's just say they find grape leaves quite tasty," the 61-year-old vintner explained. He also tried guinea pigs to solve the problem. "They were really good at eating the grass and the weeds," Yealands said. "Unfortunately, they attracted hawks. And the hawks annihilated them." **He had heard about California vineyards using Babydoll sheep, which grow no higher than 60 centimeters. Sarah Cahn Bennett, the winemaker for Navarro Vineyards and Winery in Mendocino, California, has had a small flock of Babydolls for the past four years.** "The Babydolls work great," she said of the breed, which was originally raised in Southdown, England. "They not only get rid of the weeds and grass between the rows, but they also eat the suckers at the bottom of the vines and we'd have to get rid of those anyway," she added referring to green shoots that come up on the plants in the spring. Bennett, who holds a graduate degree in viticulture, laughed as she remembered that she now also has a certificate in sheep sheering. "Generally, you have to shear them once a year," said Bennett, who sells the wool they produce. **Yealands, who is experimenting this year with a flock of six rams and four ewes and has more on order from an Australian breeder, hopes that he will match Bennett's success with the Babydolls and in the process "reduce our operational costs by more than NZ\$1.5 million (US\$1.1 million) annually."**

http://www.shanghaidaily.com/sp/article/2009/200910/20091028/article_417682.htm

Global Sustaining & Emerging Trends Digest

This section presents those global, macro and micro trends that affect or potentially affect the wine domain. Comprehensive fusion and distillation of the above publicity parathesis concludes to the most important aspects as those appear in the current setting.



Wild yeast, natural wine

LA TIMES, USA



28.10.09: **"Natural wine" is the trendiest term to be punted about by people seeking something nongeneric. It's also the vaguest, and that's a mixed blessing.** In San Francisco, a loose coalition of wine bars and shop owners is trying to define natural wine based not on grapes but on yeast. This leads to a wide range of natural

wines from around the world, often with unusual, nonfruit flavors. **The trend isn't yet as strong in Southern California, but the ground is fertile -- the move toward more, well, natural winemaking is popular here too.** "Lots of people come in and ask for organically farmed wines, or wines with no sulfites," says Thomas Rekasis, food and beverage manager for Viceroy Santa Monica hotel. Rekasis says nobody has yet asked about yeast, but it may be a matter of time. So why natural wine, and why yeast? Because the other well-meaning terms in use -- "biodynamic," "sustainable" and "organic" -- come with flaws of their own and say more about farming than winemaking.

Here's a quick primer.

Biodynamic agriculture follows the work of Austrian philosopher Rudolf Steiner, who believed in looking at a farm as a holistic organism. It involves many Earth-friendly techniques, but at its core it's an unproven spiritual practice with planting, harvesting and bottling timed by the phases of the moon. Sustainable viticulture looks at the big picture, including a winery's social and environmental impacts. Advocates argue that by definition it's the best long-term program, but because it takes economic sustainability into account, it says the least about what methods can be used to produce any one particular bottle of wine. Organic is the most loaded term of all. The U.S. government has official definitions for both "organically grown grapes" and "organic wine." To use either, a winery must pay an annual certification fee, a significant expense for small wineries. I'm a big fan of organically grown grapes but not organic wine, which in the U.S. must have no added sulfites, meaning it probably won't last long in your cellar before its fresh fruit flavors disappear. But sulfites are a naturally occurring and necessary component of wine production, so the European Union, generally more strict on wine regulations, allows added sulfites for wines labeled as organic. (If you think sulfites give you red-wine headaches, be advised that white wines, as well as dried fruit, generally have much higher levels of sulfites than red wines.) **Now here's "natural": For purists, it requires organic, biodynamic or sustainable grape growing, and wild yeast fermentation. In theory, it's a step above the others. But there's no official definition, so in practice, it could mean anything at all.** "We're coming to an agreement on what natural wine means, and the one thing we all agree on is native fermentation -- the yeast comes from the grapes," says Ian Becker, lead wine buyer for Absinthe restaurant and Arlequin Wine Merchant in San Francisco. "We all agree that using nonnative yeast, that's unnatural." I think all the terms (save organic wine) have merit, and I give extra credit to a wine that qualifies for any of them. But Becker is a zealot: He tries to carry only natural wines at Arlequin and says he would reject a wine that was biodynamically or organically farmed but did not use native yeast. "People use commercial yeasts to stay on schedule, to keep a business plan," he says. "If you're making wine to make money, you'll use commercial yeast. If you're making wine because you love it, you'll use native yeast."



Yeasts vary wildly

In a nutshell, here's how wine is made: Grapes are harvested and crushed to release their juice. Yeasts, which are in the air all around us, convert sugar in the grapes into alcohol. Then they die and slowly fall to the bottom of the tank or barrel, to be removed before bottling. Different yeasts have different characteristics. Some can tolerate high alcohol levels; this is an important reason why wines are ever more potent. Some commercial yeasts, added in a simple, descriptive process called inoculation, are even chosen for flavors they impart. In contrast, wild yeasts are a gamble. They might die before all the sugar has converted, leaving a sweet wine. Or, in the worst circumstance, they might impart off flavors. This is why most large wineries shun using them -- because they're risky. But one man's off flavor is another man's exotic. Fans of natural wines say that if wild yeasts are part of the vineyard, then their flavors are part of the wine. "We're conditioned to find funkiness a flaw," says Lou Amdur, owner of the Hollywood wine bar Lou. "But at a low level, I kind of enjoy it. I prefer wild yeasts, and I think I can tell them in a blind tasting. Just because you're farming organically or biodynamically doesn't mean you're making a natural wine or an interesting wine. There are any number of wines that are farmed in a beautiful way, but they get in the winery and they're made in a very cookie-cutter way."

French birthplace

The idea for natural wines started in France. Jules Chauvet, a négociant from Beaujolais who died in 1989, is considered the father of the concept, and more wines considered natural today are from France than anywhere else. But there are American wineries making natural wines, and some are excellent. Tracey Brandt, co-owner of Donkey & Goat winery in Berkeley, is proud of being the only American winery chosen to appear at a natural wine event in November in Stockholm. "We consider natural wines to have only natural yeasts and only be fermented in natural materials -- no stainless steel," Brandt says. "We're not religious. We just think this makes the best wine."

<http://www.latimes.com/features/food/la-fo-wine28-2009oct28,0,3728794,full.story>

